

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT		1. CONTRACT ID CODE	PAGE OF PAGES
2. AMENDMENT/MODIFICATION NO. PR-HQ-02-11865/0004	3. EFFECTIVE DATE 9/4/03	4. REQUISITION/PURCHASE REQ. NO. PR-HQ-02-11865	5. PROJECT NO. (If applicable)
6. ISSUED BY Environmental Protection Agency Bid and Proposal Room, Ariel Rios Building (3802R) 1200 Pennsylvania Avenue, N.W. Washington, DC 20460		7. ADMINISTERED BY (If other than item 6)	
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)		(✓)	9A. AMENDMENT OF SOLICITATION NO. PR-HQ-02-11865
		✓	9B. DATED (SEE ITEM 11) 07/17/03
			10A. MODIFICATION OF CONTRACT/ORDER NO.
			10B. DATED (SEE ITEM 13)
CODE	FACILITY CODE		

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☒ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☒ is extended, ☐ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a) By completing Items 8 and 15, and returning 1 copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS, IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

(✓)	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
	D. OTHER (Specify type of modification and authority)

E. IMPORTANT: Contractor ☐ is not, ☐ is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of this amendment is to expand the technical proposal instructions and evaluation criteria to address technical approach, and to break out the point scores for Technical Experience and Approach into subcriteria. The closing date for submission of proposals is further extended to 2:00 p.m., local time, on Monday, September 22, 2003.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)	
		Kristin Wright	
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA	16C. DATE SIGNED
(Signature of person authorized to sign)		(Signature of Contracting Officer)	

NSN 7540-01-152-8070

PREVIOUS EDITION UNUSABLE

30-105

STANDARD FORM 30 (REV 10-83)
Prescribed by GSA
FAR (48 CFR) 52.243

AMENDMENTS TO THE SOLICITATION

1. The Section L clause entitled "INSTRUCTIONS FOR THE PREPARATION OF PROPOSALS (EPAAR 1552.215-72) (AUG 1999)" has been modified. The text is as follows:

A. Other than cost proposal instructions.

(1) Submit proposal for other than cost factors as a separate part of the total proposal package. Omit all cost or pricing details from this proposal.

(2) Special proposal instructions:

See provision L.20- Additional Bid/Proposal Submission Instructions for proposal delivery and labeling requirements.

TECHNICAL PROPOSAL REQUIREMENTS

A. Proposal Preparation

In the event any portion of the proposal is not written by a bonafide employee of the firm submitting the proposal, a certification to this effect shall be attached to the RFP package and signed by a responsible officer of the Offeror showing the person's name, employment capacity, the name of his/her firm, the relationship of that firm to the Offeror, and the portion of the proposal so written by the individual.

B. Proposal Format

This proposal shall be prepared on standard-size 8 ½" x 11" 100% recycled paper, single spaced, with foldouts as required. Two-sided printing is required, except on the foldouts. Each Offeror shall utilize 12-point type. Type size shall not be smaller than 12 characters per inch. Reduction may be used only for tables and figures, but legibility must be maintained. If foldout pages are used, they shall not exceed 11" x 17". Each foldout shall count as two (2) pages toward the page count of the appropriate volume. Margins shall not be less than one-inch at top, bottom, and sides, excluding page number. No cost information shall be submitted in any other volume other than the Cost Volume.

1. Cover and Title Page. The Cover and Title page of each proposal must indicate the following information:

The document number and title (Volume I - Technical Proposal: Volume II - Cost Proposal;
The service nomenclature and solicitation number of the RFP;

The full company name of the Offeror;

The address of the Offeror;

Offeror's position regarding disclosure of proposal data in accordance with the provisions entitled "Restrictions on Disclosure and use of Data in Proposals.

2. **Master Index.** The Master Index must provide a single integrated index for the entire proposal. The Master Index must be placed at the beginning of each volume. This Master Index must identify each major subsection by number, title, volume, and page number. This index must also cross-reference the appropriate proposal volume and paragraphs to specific RFP paragraphs. The intent of the Master Index is to assure that all requirements are addressed and easily accessible to the evaluators. Copies of the Master Index must be identical for all volumes.

3. **Binders.** The proposal volumes shall be provided in separate three-ring binders to permit removal of individual sections. The company name of the Offeror shall appear at the top of each page.

C. Proposal Content

Each Offeror shall submit a proposal in response to this solicitation subject to the following requirements and limitation:

<u>VOLUME</u>	<u>TITLE</u>	<u>PAGE LIMIT</u>	<u>ORIGINAL</u>	<u>COPIES</u>	<u>TOTAL</u>
I	Technical/Management	210	1	5	6
II	Cost	No Limit	1	3	4
III	Solicitation Set	N/A	1	1	2

Warning: In the event an Offeror exceeds the specified page limit for the Technical/Management volume, the Government will remove the excess pages from the back of the volume, and they will not be evaluated. No cost information shall be submitted in any other volume other than the cost volume.

TECHNICAL PROPOSAL - VOLUME I REQUIREMENTS

The technical proposal and associated references are the sole bases for evaluating the technical merits of what is offered, the degree to which the Offeror's claims of performance capability are supported, and the ability of the Offeror to perform in accordance with the requirements. The page limit for the Technical Proposal shall be no more than 200 pages, not counting the introduction, sample work plan and resumes for the proposed staff. The technical/management factors to be considered are discussed herein.

The technical proposal shall encompass the factors listed below. The evaluation of each factor will consider completeness and clarity, degree of compliance with the solicitation, and the risk of the proposed approach.

I. Technical Experience and Approach

Offerors shall demonstrate **technical experience, capabilities and technical approach** in performing the requirements of the SOW, including the planning, piloting, evaluation and scale up of innovative environmental programs and activities, and design and implementation of strategies for systemic organizational change. Such **experience, capabilities and approach** must relate both to analytic support and to implementation tasks such as facilitation of stakeholder processes, public communication, and meeting support. This may include experience, capabilities and abilities relating to such innovations in environmental protection as: Project XL, P4, projects under the EPA./State Agreement on Innovation, Performance Track, the Sustainable

Industries Program; community-based environmental protection (CBEP); environmental management systems (EMSs); voluntary programs; pollution prevention; emissions and effluent trading; and other nontraditional approaches to environmental protection, especially those with a significant cross-media aspect and stakeholder or community involvement.

The Offerors shall discuss their demonstrated **ability and approach** to recognize and address the complexities, difficulties, and problems involved with the programs and tasks associated with environmental policy innovation, particularly the planning, piloting, evaluation and scale up of innovative environmental programs and activities, and design and implementation of strategies for systemic organizational change. Such tasks may include both substantive analysis and implementation tasks (e.g., facilitation of stakeholder processes, communication strategies, and meeting support).

The offeror must demonstrate the **ability and approach** to perform all the activities described in the SOW, including:

- policy analysis, including economic and scientific issues
- data gathering
- facilitation of discussions among diverse groups and interests
- program evaluation
- public communication, both written and electronic
- information management
- technical support for electronic and web-based communications
- meeting support

The offeror shall demonstrate proficiency in policy design and analysis, program evaluation, preparation of communications materials, facilitation and organizational change.

Additionally, in order to better assess technical approach, offerors should respond to all three of the sample Work Assignments and prepare a work plan that describes how each task will be accomplished. In addition to the information requested in the Sample Work Assignment, the Work Plan should address:

- a. Major issues they identify concerning the work assignment;
- b. Major milestones or activities for the SOW tasks (sub-tasks)
- c. Estimated time frames/schedules to complete these major milestones or activities;
- d. Decision points and responsible parties making the decision;
- e. Contractor actions, EPA actions, actions by other parties;
- f. Potential problems or bottlenecks to project completion and proposed solutions.

2. Management Approach

The management approach should clearly indicate the offeror's plan for managing projects and work assignments: the lines of authority, roles and responsibilities, plan for communications, control plans including those for subcontract management, and the system for identifying and addressing any problems that might arise (including unexpected resource/LOE expenditures on specified tasks or other budget constraints for assigned tasks). The plan should address the extent to which the Offerors management approach and key personnel address the programmatic, organizational and functional requirements as described in the SOW while providing economy

and efficiency to the Government, including the quality, feasibility, appropriateness, and completeness of the Offerors':

Quality Management Plan: Offerors shall prepare a Quality Management Plan which addresses the offeror's demonstrated capability and expertise for quality assurance. The Quality Management Plan shall address the following: A statement of policy concerning the organization's commitment to implement a Quality Control/Quality Assurance program to assure generation of measurement data of adequate quality to meet the requirements of the Statement of Work (SOW) and the individual Work Assignments (WAs) issued pursuant to the SOW; an organizational chart showing the position of a QA function or person within the organization; a delineation of the authority and responsibilities of the QA function or person and the related data quality responsibilities of other functional groups of the organization; the type and degree of experience in developing and applying Quality Control/Quality Assurance procedures to the proposed methods needed for performance of the SOW and the individual WAs issued pursuant to the SOW; the background and experience of the proposed personnel relevant to accomplish the QA specifications in the SOW and the individual WAs issued pursuant to the SOW; the Offerors general approach for accomplishing the QA specifications in the SOW and the individual WAs issued pursuant to the SOW. The Quality Management Plan is NOT subject to the page count limitation for Technical proposals.

3. Corporate Experience

Offerors shall describe their demonstrated corporate experience (including subcontractors and affiliates) in performing work similar in scope, diversity, dollar value and complexity to the requirements of the SOW. Offerors shall submit a list of all contracts and subcontracts currently in process, or completed within the past three years which are similar in nature to this requirement, including work for Federal, State, local governments and commercial businesses.

4. Key Personnel

Project Manager, Quality Assurance official, and all P4's are designated as Key Personnel. The Offeror shall demonstrate that their proposed Key Personnel meet the minimum qualification requirements for education and relevant experience as defined in the Section H clause entitled "Definitions of Labor Classifications," and on the extent to which they possess the appropriate technical knowledge and expertise on the requirements and tasks described in the SOW. In addition, Offerors shall identify that their proposed Key Personnel demonstrate their ability and relevant knowledge, skills and abilities within their respective subject areas and their ability to perform the typical duties associated with their proposed position.

5. Past Performance

The Offeror shall submit the information requested in provision 1552.215-75, entitled "Past Performance Information," located in section L of this RFP. Offerors should also submit completed copies of Page 1 of the Past Performance Questionnaire (Attachment 8 to this RFP) for each reference, in accordance with the instructions for the questionnaire. Past Performance Questionnaires are not subject to the page count limitation for Technical Proposals, and may be submitted in advance, or with the submission of the full proposals.

6. Small Disadvantaged Business (SDB) Participation

Offerors shall discuss their plan for utilization of SDB's in accordance with EPAAR 1552.219-72, entitled Small Disadvantaged Business Participation Program, included as provision L.16 of this RFP.

The agency has established fiscal year 2003 goals, detailed below, for participation by small disadvantaged businesses, in EPA contracts. Offerors to this contract may identify their commitment to helping the Agency achieve these goals. When identifying this commitment, offerors shall present a detailed plan and tangible commitment to utilize other SDBs in the performance of work under this contract with particular emphasis on Offeror's participation in the EPA Mentor-Protege Program started in July 1992. Offerors shall identify the SDBs proposed and the area(s) of their expertise related to the SOW. The percentages below represent goals for Offerors to consider in developing their subcontracting plan.

Small Business: 50%

Small Disadvantaged Business: 20%

Women-owned Business: 6%

HUB Zone: 3%

Service Disabled Veterans: 3%

B. COST PROPOSAL INSTRUCTIONS - VOLUME II REQUIREMENTS

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I. General

II. Direct Labor

III. Other Direct Costs

IV. Consultants

V. Subcontracts

VI. Indirect Costs

EXHIBIT - A Cost Proposal Model

COST PROPOSAL INSTRUCTIONS

The total period of performance for this contract is five (5) years, which includes a one-year base period and four one-year option periods. Your cost or price proposal shall be specific, complete in every detail, and separate from your technical proposal.

I. GENERAL - The offeror shall provide the following information (Items 1 - 7) on the first page of the pricing proposal:

- (1) Solicitation number;
- (2) Name and address of offeror;
- (3) Name and telephone number of point of contact;
- (4) Proposed cost, fee and total;
- (5) The following statement:
 “This proposal is submitted in response to the solicitation in Item 1. By submitting this proposal, the offeror, if selected for discussions, grants the contracting officer or an authorized representative the right to examine, at any time before award, any of those books, records, documents, or other records directly pertinent to the information requested or submitted.”;
- (6) Date of submission;
- (7) Name, title and signature of authorized representative

A. Clearly identify separate cost data associated with each year of the contract’s period of performance.

1. Provide the above cost detailed breakdown on spreadsheets (cost schedules) as follows:
 - Total Contract Summary Proposal
 - Total Base Period (including base and optional quantities)
 - Base Period, Base Quantity
 - Base Period, Single Optional Quantity

- Base Period, All Optional Quantities
- Total Option Period I (including base and optional quantities)
- Option Period I, Base Quantity
- Option Period I, Single Optional Quantity
- Option Period I, All Optional Quantities
- Total Option Period II (including base and optional quantities)
- Option Period II, Base Quantity
- Option Period II, Single Optional Quantity
- Option Period II, All Optional Quantities
- Total Option Period III(including base and optional quantities)
- Option Period III, Base Quantity
- Option Period III, Single Optional Quantity
- Option Period III, All Optional Quantities
- Total Option Period IV(including base and optional quantities)
- Option Period IV, Base Quantity
- Option Period IV, Single Optional Quantity
- Option Period IV, All Optional Quantities

PLEASE NOTE: The cost proposal model provided as EXHIBIT - A may be used, however, offerors should tailor the model to their own normal accounting practices.

2. In accordance with FAR 15.403-3(a), provide information sufficient to support the Government's cost realism analysis of your cost proposal.
3. Submit a current financial statement, including a balance sheet and a statement of profit and loss for the last completed fiscal year. Specify resources available to perform the contract without assistance from any outside source. If sufficient resources are not available, indicate in your proposal the amount required and the anticipated source (i.e., bank loans, letter or lines of credit, etc.).
4. If other divisions, subsidiaries, a parent or affiliated companies will perform work or furnish materials under this proposed contract, please provide the name and location of such affiliates and your intercompany pricing policy. Separately identify costs and supporting data for each such entity proposed.

(Paragraph 5 deleted)

II. DIRECT LABOR

- A. The direct labor hours (level-of-effort (LOE)) appearing below are for professional labor only. These hours do not include management at a level higher than the project management or clerical support staff. If it is your normal practice to charge these types of personnel as a direct cost, your proposal must include them along with an estimate of the directly chargeable labor-hours for these personnel. If this type of effort is normally included in your indirect cost allocations, no estimate is required. However, direct charging of indirect costs on any resulting contract will not be allowed.
- B. For the purpose of evaluation, offerors are required to propose the following LOE hours. The offeror's cost proposal shall only provide the distribution of LOE by professional labor types or categories in accordance with the Statement of Work and the Technical Proposal Instructions.

Base Quantity Hours

<u>Period</u>	<u>P4</u>	<u>P3</u>	<u>P2</u>	<u>P1</u>	<u>Total</u>
Base Year	2,183	4,366	3,792	1,149	11,490
Option I	3,513	7,026	6,102	1,849	18,490
Option II	3,513	7,026	6,102	1,849	18,490
Option III	3,513	7,026	6,102	1,849	18,490
Option IV	3,513	7,026	6,102	1,849	18,490

Option to Increase Quantity Hours

All Optional Quantity Increments

<u>Period</u>	<u>P4</u>	<u>P3</u>	<u>P2</u>	<u>P1</u>	<u>Total</u>
Base Year	4,370	8,740	7,590	2,300	23,000
Option I	3,040	6,080	5,280	1,600	16,000
Option II	3,040	6,080	5,280	1,600	16,000
Option III	3,040	6,080	5,280	1,600	16,000
Option IV	3,040	6,080	5,280	1,600	16,000

Single Optional Quantity Increments

<u>Period</u>	<u>P4</u>	<u>P3</u>	<u>P2</u>	<u>P1</u>	<u>Total</u>
Base Year	190	380	330	100	1,000
Option I	190	380	330	100	1,000
Option II	190	380	330	100	1,000
Option III	190	380	330	100	1,000
Option IV	190	380	330	100	1,000

- C. Offerors shall use the Labor Category Qualifications provided in Section (H) of the solicitation in preparing their technical and cost proposals.
- D. Attach support schedules indicating types or categories of labor, together with labor hours for each category and rate of compensation. Indicate the method used in computing the labor rate. If individual labor rates are proposed, give employee names. All management and support (such as clerical, corporate and day-to-day management) hours and costs proposed to be a direct charge in accordance with your normal accounting treatment, are to be shown separately from that of the technical effort.
- E. When identifying individuals assigned to the project, specify in which of the professional categories the individual belongs.
- F. The direct labor hour mix and personnel proposed as part of the cost proposal shall be the same as proposed in the technical proposal.
- G. Indicate whether current rates or escalated rates are used. If escalation is included, state the degree (percent) and methodology. The methodology shall include the effective date of the base rates and the policy on salary reviews (e.g. anniversary date of employee or salary reviews for all employees on a specific date). The offeror shall include the date of the payroll from which hourly rates were obtained.
- H. State whether any additional direct labor (new hires) will be required during the performance period of this acquisition. If so, state the number required.
- I. With respect to educational institutions, include the following information for those professional staff members whose salary is expected to be covered by a stipulated salary support agreement pursuant to OMB Circular A-21.
 - 1. Individual's name;
 - 2. Annual salary and the period for which the salary is applicable;
 - 3. List of other research projects or proposals for which salary is allocated, and the proportionate time charged to each; and
 - 4. Other duties, such as teaching assignments, administrative assignments, and other institutional activities. Show the proportionate time charged to each.

(Show proportionate time charged as a percentage of 100% of time for the entire academic year, exclusive of vacation or sabbatical leave.)

III. OTHER DIRECT COSTS

- A. Except as noted below in paragraph (C), for evaluation purposes, offerors shall propose the Other Direct Costs provided in clauses B.3, Other Direct Costs; H.7, Option to Extend the Term of the Contract - Cost Type Contract; and H.8 for Increased Quantity - Cost Type Contract.
- B. Other Direct Costs as specified in this RFP are exclusive of any applicable indirect cost and fee.
- C. Equipment (not including special equipment)
 - 1. EPA does not anticipate furnishing any equipment to the Contractor under this procurement except under unusual circumstances, for example, see paragraph (E) below.
 - 2. Identify existing Government-owned property in the possession of the offeror which the offeror proposes to be used in the performance of the contract, and the Government agency which has cognizance over the property.
- E. Facilities and special equipment, including tooling.

If special purpose facilities or equipment is being proposed, provide a description of these items, details of the proposed costs including competitive prices, and a justification as to why the Government should furnish the equipment or allow its purchase with contract funds.

IV. CONSULTANT SERVICES

Identify the contemplated consultants. State the amount of service estimated to be required and the consultant's quoted daily or hourly rate.

V. SUBCONTRACTS

When the cost of a subcontract is substantial (5% percent of the prime contractor's estimated contract value or \$100,000, whichever is less), include details of subcontract costs in the same format as the prime contractor's costs. Include a cost or price analysis of the subcontract costs.

VI. INDIRECT COSTS (fringe benefits, overhead, general and administrative expenses).

- A. Unless your proposed indirect rate(s) have recently been accepted by a contracting agency of the Government, provide the following detailed supporting computations:
 - i. Include historical or budgeted data. Indicate whether your computations are based upon historical or projected data.
 - ii. Additionally, provide the actual indirect rates for the past five years including the indirect rates proposed, the actual indirect rates experienced and, if available, the final negotiated rates. For each rate, provide the total dollar amount for pool expenses (the numerator) and total allocation base costs (the denominator), and the number of unallowable costs included in the historical data.
- B. If your rates have been recently approved, include a copy of the agreement. If the agreement does not cover the projected performance period of the proposed effort, provide the rationale and any estimated rate calculations for the proposed performance period.
- C. Offerors who propose indirect rates for new or substantially reorganized cost centers should consider offering to accept ceilings on the indirect rates at the proposed rates. Similarly, offerors whose subcontractors propose indirect rates for new or substantially reorganized cost centers should likewise consider offering to accept ceilings on the subcontractors' indirect rates at the proposed rates.

____ Note: The Government reserves the right to adjust an offeror's or its subcontractors' estimated indirect costs for evaluation purposes based on the Agency's judgement of the most probable costs up to the amount of any stated ceiling.

- D. The offeror shall furnish the name and address of the Government agency and the name of the reviewing official if their rates have been recently accepted by a Government agency.

PLEASE NOTE: THIS COST PROPOSAL MODEL SHOULD BE TAILORED TO
YOUR NORMAL ACCOUNTING PRACTICES

EXHIBIT A
COST PROPOSAL MODEL

Technical Support for the Office of Children's Health Protection
RFP #PR-HQ-02-11075

SUMMARY **

<u>COST ELEMENT</u>	<u>TOTAL</u>	<u>COST</u>
	<u>RATE</u> <u>HOURS</u>	

A - DIRECT LABOR:

1. Professional Labor Category or Discipline
- 2.
- 3.
- 4.

Total Professional LOE

Total Clerical Hours (if applicable)

TOTAL - Direct Labor

B - FRINGE: (if applicable)

____% of Total Direct Labor Costs

C - LABOR OVERHEAD: (if applicable)

____% (Basis)

TOTAL - Fringe & Overhead

D - OTHER DIRECT COSTS:

E - TEAM SUBCONTRACTORS

- 1.
- 2.
- 3.

TOTAL - Team Subcontractor Cost

F - SUBTOTAL - Estimated Cost without G&A

G- G&A EXPENSE: ____% (Basis) (if applicable)

H- TOTAL - Estimated Cost

I - FIXED FEE: ____% (Basis)

J - TOTAL - Estimated Cost and Fixed Fee

**** Indicate: Contract Period and Base of Optional Quantity (for example Base Period, Base Quantity; or Total Contract)**

SOLICITATION SET - VOLUME III REQUIREMENTS

Offerors should submit an original plus one signed copy of the solicitation Page 1, and any amendments as Volume III of their proposal.

2. The Section M clause entitled "EVALUATION FACTORS FOR AWARD (EPAAR 1552.215-71) (AUG 1999)" has been modified. The text is as follows:

(a) The Government will make award to the responsible offeror(s) whose offer conforms to the solicitation and is most advantageous to the Government cost or other factors considered. For this solicitation, all evaluation factors other than cost or price when combined are significantly more important than cost or price.

(b) Evaluation factors and significant subfactors to determine quality of product or service:

I. Technical Experience and Approach

TOTAL WEIGHT 35 points = 35% (subfactor point breakout shown as follows)
General Technical Experience and Approach 25 points = 25%
Sample Work Assignments 10 points = 25%

Offerors will be evaluated on their demonstrated technical **experience, capabilities and technical approach** in performing the requirements of the SOW, including the planning, piloting, evaluation and scale up of innovative environmental programs and activities, and design and implementation of strategies for systemic organizational change. Such **experience, capabilities and approach** will be evaluated with regard to analytic support and to implementation tasks such as facilitation of stakeholder processes, public communication, and meeting support. Offerors will be evaluated on their experience, capabilities and abilities relating to such

innovations in environmental protection as: Project XL, P4, projects under the EPA./State Agreement on Innovation, Performance Track, the Sustainable Industries Program; community-based environmental protection (CBEP); environmental management systems (EMSs); voluntary programs; pollution prevention; emissions and effluent trading; and other nontraditional approaches to environmental protection, especially those with a significant cross-media aspect and stakeholder or community involvement.

The Offerors will be evaluated on their demonstrated **ability and approach** to recognize and address the complexities, difficulties, and problems involved with the programs and tasks associated with environmental policy innovation, particularly the planning, piloting, evaluation and scale up of innovative environmental programs and activities, and design and implementation of strategies for systemic organizational change. Such tasks may include both substantive analysis and implementation tasks (e.g., facilitation of stakeholder processes, communication strategies, and meeting support).

The Offeror will be evaluated on their **ability and approach** to perform all the activities described in the SOW, including:

- policy analysis, including economic and scientific issues
- data gathering
- facilitation of discussions among diverse groups and interests
- program evaluation
- public communication, both written and electronic
- information management
- technical support for electronic and web-based communications
- meeting support

The Offeror will be evaluated on their proficiency in policy design and analysis, program evaluation, preparation of communications materials, facilitation and organizational change.

The offeror will be evaluated on its response to the Sample Statement of Work, and the workplan's description of how the work will be accomplished. The Workplan will be evaluated on how well it addresses the following:

- a. Major issues they identify concerning the work assignment;
- b. Major milestones or activities for the SOW tasks (sub-tasks)
- c. Estimated time frames/schedules to complete these major milestones or activities;
- d. Decision points and responsible parties making the decision;
- e. Contractor actions, EPA actions, actions by other parties;
- f. Potential problems or bottlenecks to project completion and proposed solutions.

2. Management Approach

WEIGHT 15 points = 15%

The Offeror will be evaluated on their plan for managing projects and work assignments: the lines of authority, roles and responsibilities, plan for communications, control plans including those for subcontract management, and the system for identifying and addressing any problems that might arise (including unexpected resource/LOE expenditures on specified tasks or other budget constraints for assigned tasks). The plan will be evaluated on the extent to which the Offeror's management approach and key personnel address the programmatic,

organizational and functional requirements as described in the SOW while providing economy and efficiency to the Government, including the quality, feasibility, appropriateness, and completeness of the Offerors':

Quality Management Plan: The Offeror's Quality Management Plan will be evaluated on how it addresses the offeror's demonstrated capability and expertise for quality assurance. The following will be evaluated within the Quality Management Plan: A statement of policy concerning the organization's commitment to implement a Quality Control/Quality Assurance program to assure generation of measurement data of adequate quality to meet the requirements of the Statement of Work (SOW) and the individual Work Assignments (WAs) issued pursuant to the SOW; an organizational chart showing the position of a QA function or person within the organization; a delineation of the authority and responsibilities of the QA function or person and the related data quality responsibilities of other functional groups of the organization; the type and degree of experience in developing and applying Quality Control/Quality Assurance procedures to the proposed methods needed for performance of the SOW and the individual WAs issued pursuant to the SOW; the background and experience of the proposed personnel relevant to accomplish the QA specifications in the SOW and the individual WAs issued pursuant to the SOW; the Offerors general approach for accomplishing the QA specifications in the SOW and the individual WAs issued pursuant to the SOW.

3. Corporate Experience

WEIGHT 15 points = 15%

The Offeror's corporate experience (including subcontractors and affiliates) in performing work similar in scope, diversity, dollar value and complexity to the requirements of the SOW will be evaluated. The Offeror's submission of a list of all contracts and subcontracts currently in process, or completed within the past three years which are similar in nature to this requirement, including work for Federal, State, local governments and commercial businesses will be evaluated.

4. Key Personnel

WEIGHT 15 points = 15%

The Offeror will be evaluated on the ability of their proposed Key Personnel to meet the minimum qualification requirements for education and relevant experience as defined in the Section H clause entitled "Definitions of Labor Classifications," and on the extent to which they possess the appropriate technical knowledge and expertise on the requirements and tasks described in the SOW. In addition, Offerors will be evaluated on their proposed Key Personnel's demonstrated relevant knowledge, skills and abilities within their respective subject areas and their ability to perform the typical duties associated with their proposed position.

5. Past Performance

WEIGHT 15 points = 15%

The Offeror's past performance evaluation will be based on the information presented on its proposal, on information obtained from the Offeror's supplied references, on information obtained through the National Institutes of Health (NIH) Contractor Performance System (CPS) (if applicable), and on other information obtained by the Government from other sources. Offerors will be evaluated on previous customer satisfaction in the following areas, which are all of equal importance:

1. Quality of services/supplies,
2. Timeliness of performance,
3. Effectiveness of management (including subcontractors),
4. Initiative in meeting requirements,
5. Response to Technical Direction,
6. Responsiveness to performance problems,
7. Cost Control,
8. Customer satisfaction, and
9. Overall performance.

Offerors with no past performance history, whose past performance history is not relevant, or for whom past performance data is not available, will not be evaluated favorably or unfavorably on past performance. Every attempt will be made to ascertain meaningful past performance information on which the Offeror's prior performance can be evaluated. Note: If an offer or does not submit the past performance information required, and EPA becomes aware that the Offeror, in fact, has past performance history, the offer or may be deemed ineligible for award.

6. Small Disadvantaged Business (SDB) Participation

WEIGHT 5 points = 5%

Offerors will be evaluated on their plan for utilization of SDB's, according to EPAAR 1552.219-74, entitled Small Disadvantaged Business Participation Evaluation Factor, included as provision M.6 of this RFP.

Technical Evaluation Criteria Total	100
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